Supporting Statement
Approval Request to Conduct Customer Satisfaction Research (OMB #1545-1432)
Statistics of Income – Tax Stats Website Customer Survey

A. JUSTIFICATION

1. Circumstances Making the Collection of Information Necessary

Statistics of Income (SOI) is redesigning the Tax Stats Website and the IRS Data Book to better meet needs of current and potential customers. The overarching goals of this redesign are to deliver dynamic and easily understandable content to attract new customers and engage current customers who may have less experience with statistical or Tax data. SOI would also like to enable customers to quickly find information, provide means of downloading the data in multiple and accessible formats, and create a user-friendly user experience. The Tax Stats Website Customer Survey would benefit SOI in gaining insight about the different types of users visiting the site and assessing customer satisfaction.

The Internal Revenue Service enlists a balanced measurement system consisting of business results, customer satisfaction, and employee satisfaction. This initiative is part of the service-wide effort to maintain a system of balanced organizational performance measures mandated by the IRS Restructuring and Reform Act of 1998. This is also a result of Executive Order 12862 (Setting Customer Service Standards, issued on September 11, 1993) that requires all government agencies to survey their customers. Pursuant to Executive Order 12862, agencies that provide significant services to the public must survey customers to determine the kind and quality of services they want and their level of satisfaction with existing services.

2. Purpose and Use of the Information Collection

The goals of the survey are to gain insight about the different types of users coming to the website pages, for example, their occupation and industry and determine if these customers are able to find the information they are looking for. The feedback received will enable SOI to identify improvement areas for the Tax Stats Website and IRS Data Book. The information collected in the survey will also allow SOI to establish baseline metrics with which it can eventually evaluate the success of the redesign in helping customers find the information they need efficiently. Ultimately, these improvements will positively affect all Tax Stats Website customers.

The data will be analyzed using Microsoft Excel to gather insights about who SOI's customers are and what their needs are. The results will be aggregated and no personally identifying information will be reported on. The information will be used to create graphs based on the results from each question.

3. Consideration Given to Information Technology

This survey will be delivered online for approximately 30 – 60 days on SOI's webpages with the highest volume of visitor traffic.

4. Duplication of Information

This survey will provide valuable information that is not available in any internal IRS data source.

5. Reducing the Burden on Small Entities

N/A

6. Consequences of Not Conducting Collection

Statistics of Income (SOI) needs to have a better understanding of the types of customers visiting the website and their overall satisfaction with the Tax Stats website and the IRS Data Book. In the process of site redesign and upgrades, customer types and customer needs must be understood in order to make the redesign most valuable. If the survey is not conducted, the website redesign will continue to be geared towards very knowledgeable users who visit the website frequently and will not reach a wider audience who are not as familiar with the site or statistical data. This will cause the redesign efforts for the Tax Stats website and IRS Data Book to be less effective, as SOI will not have the data to know which areas of the website identified by customers need improvement or need to be developed to services these different types of customers.

7. Special Circumstances

There are no special circumstances. The information collected will be voluntary.

8. Consultations with Persons Outside the Agency

N/A

9. Payment or Gift

N/A

10. Confidentiality

The survey will not collect any PII data. The survey will not contain tax return or taxpayer information. Survey participants will not be identified in any of the documents or files used for this project. We will limit and control the amount of information we collect to those items that are necessary to accomplish the research questions. This will be achieved by providing a list of possible answers via a pull-down selection and yes/no buttons. There will be an optional text entry where users will be instructed not to enter any sensitive information. We will carefully safeguard the security of data utilized as well as the privacy to the extent allowed by law of the survey respondents to the extent allowed by law.

11. Sensitive Nature

No questions will be asked that are of a personal or sensitive nature.

12. Burden of Information Collection

The survey is designed to minimize burden on the taxpayer. The time that a respondent takes to complete the survey is carefully considered and only basic demographic and satisfaction areas are being surveyed. The average time of survey completion is expected to be 3 minutes.

There is an average of 125k unique page views per month with the average user navigating 10-15 pages to find what they need per visit. This results in about 8,000+ unique visitors per month. A conservative response rate range is 10-20%. The contact time to determine non-participants could take up to one minute to click the survey link and review the survey without responding.

Using a 15% response rate, we expect to receive 1,200 responses. Contact time and survey completion time is three minutes. The contact time to determine non-participation is one minute. The total annual burden hours requested is 173.3 hrs.

The estimated time to complete the survey is three minutes with an assumed 15 percent response rate. We expect to contact 6,800 (6,800x1/60=113.3 hours) potential participants that will not respond to the survey. There are 1,200 taxpayers (1,200x3/60=60 hours) expected to respond to the survey.

<u>Collection Online Survey</u>

Category of Respondent	**No. of Respondents**	**Participation Time (in minutes)***	**Burden (in hours)**
Collection Non-participant	6800	1 min	113.3
Collection Expected Participants	1200	3 min	60
Total Burden			**173.3**

<u>Total Burden Estimate Rate: 173.3 hrs</u>

13. Costs to Respondents

N/A

14. Cost to Federal Government

There is no direct cost to the Federal Government. The survey will be delivered through IRS resources.

15. Reason for Change

N/A

16. Tabulation of Results, Schedule, Analysis Plans

The survey data is collected via online questionnaire and is an established and tested survey instrument. The survey includes several demographics questions, such as "What is your Occupation?" and "What is your Industry?" Also, customer satisfaction questions are asked, such as "Were you able to find what you were looking for?" In addition, space is provided for customers to explain their answer to this yes/no question. Minor adjustments may be made to the questionnaire to address clarity issues in the wording of questions or the response options.

Analysis of the survey results will include tabulation and graph creation based on survey response. Initial responses to the question "were you able to find what you were looking for" will be used to establish a baseline of to what extent is the Tax Stats Website currently meeting customer needs. All survey responses will be released only as summaries. No identifying information will be given by the respondents and as such, the individuals conducting the analysis will not have to worry about holding the identities, of the taxpayers responding to the survey, private to the extent permitted by law. This data will not include any individually identifying information such as name, address, or taxpayer identification number.

17. Display of OMB Approval Date
N/A

18. Exceptions to Certification for Paperwork Reduction Act Submissions
N/A

19. Dates collection will begin and end

1/4/16 – 2/12/16

B. STATISTICAL METHODS

1. Universe and Respondent Selection

Survey participants are individuals who visit the IRS.gov Tax Stats website page and choose to respond to the optional survey.

2. Procedures for Collecting Information

A hyperlink will be available from each of the top visited SOI web pages for customers to participate in the survey. The survey will present questions with drop down lists and yes/no buttons for responses in order to get the highest response rate possible.

3. Methods to Maximize Response

The questionnaire length is minimized to reduce respondent burden; thereby, tending to increase response rates. The survey will be available through a Customer Survey link on the most visited

SOI Tax Stats web pages.

4. Testing of Procedures

The questionnaire is an established and tested survey instrument. If changes are made to the survey questions, only minor changes are expected.

5. Contacts for Statistical Aspects and Data Collection

For questions regarding the study or questionnaire design or statistical methodology, contact:

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Survey instruments include the following and are attached in one document as a separate file.

- List of the 5 survey questions – utilizing drop down lists and yes/no buttons. Includes optional open text box for select questions.